Montana Grants and Loans

NAVAGATING

THROUGH THE

ON-LINE GRANT MANAGEMENT SYSTEM

Primary Sector Workforce Training Grant Program (WTG)

December 12, 2013

Table of Contents

Introduction

The Montana Department of Commerce will be using the FundingMT.org web portal to manage the Primary Sector Workforce Training (WTG) Program.

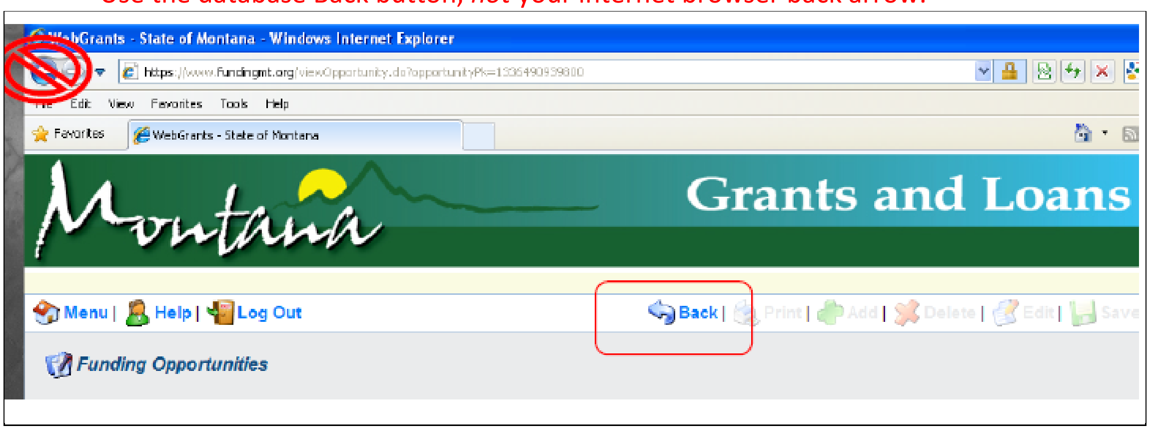
To aid in this transition from paper to paperless, WTG staff have developed this manual to assist you through the steps of managing the grant. If you have had a WTG grant in the past, you will see that the forms have not changed, just the processes of submitting the information to staff.

Basics:

- Any text that is highlighted with Light Blue is a link. This is what you click on.

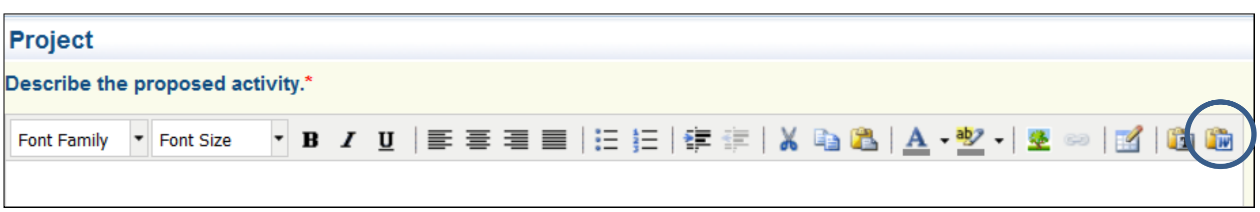
Back Arrow

- Use the database Back button, *not* your internet browser back arrow.

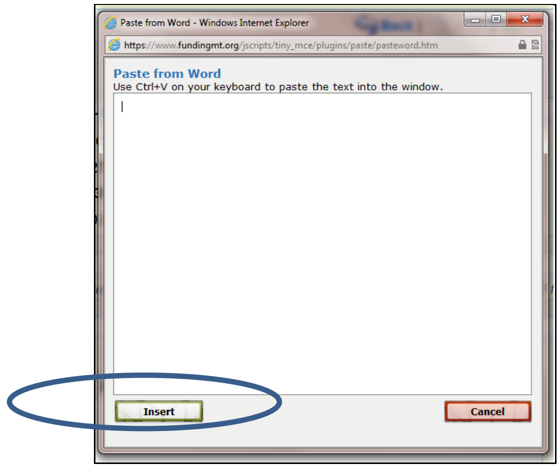


Cutting and Pasting from Microsoft WORD

- The system does not have a spell checker. You are welcome to prepare the narrative information in Word. If using Word, it is a two-step process to insert the data.
    - Copy the word data.
    - Paste the information into the application using the Word button (clipboard with Word icon).

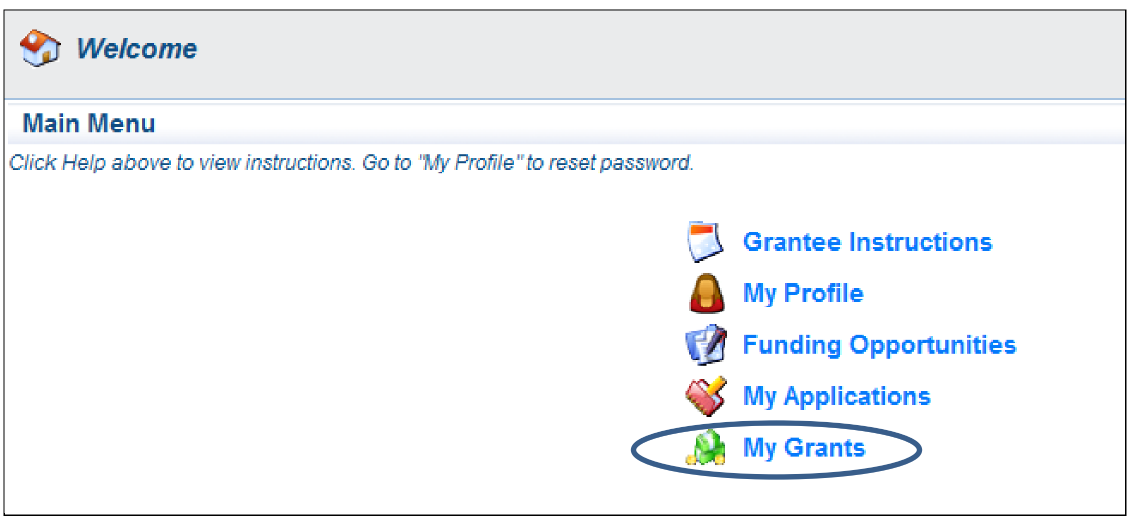


- A dialogue box will open. Copy the data into the dialogue box and hit insert.

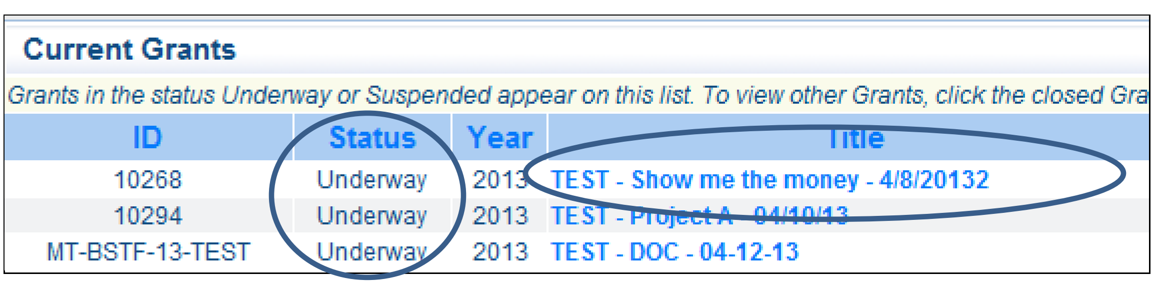


Grant Components

- As soon as the contract, between the applicant and the Department, has been fully executed, the applicant will receive a notice, via Webgrants, that the application status has been changed.
- With an “Underway” status, successful applicants will have access to the Grant Components, which will be the vehicle to administer the awarded grant.
- Once your project has received the “Underway” status, from the main menu click “My Grants”.



- The next screen will list all the grants that have received “Underway” status.



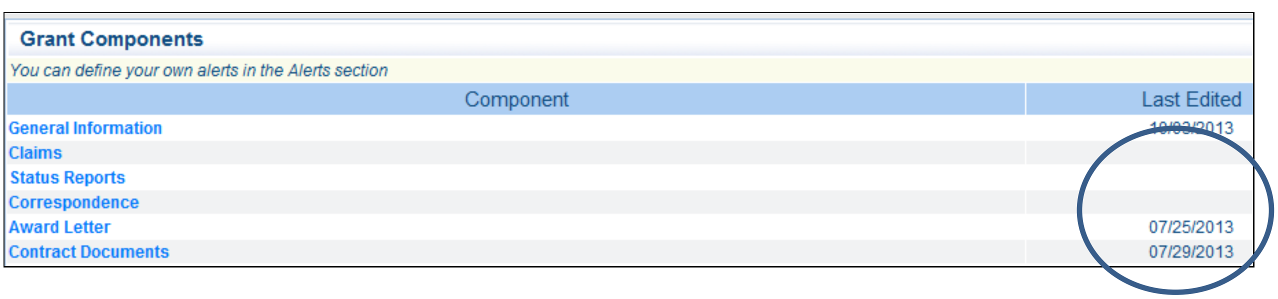
Current Grants

Grants in the status Underway or Suspended appear on this list. To view other Grants, click the closed Gra

ID	Status	Year	Title
10268	Underway	2013	TEST - Show me the money - 4/8/20132
10294	Underway	2013	TEST - Project A - 04/10/13
MT-BSTF-13-TEST	Underway	2013	TEST - DOC - 04-12-13

- Click on the title of the grant that you are working on.
- Please note: any light blue font will open up a screen and/or document.
- The next screen is the “Grant Components” section and should look like this:

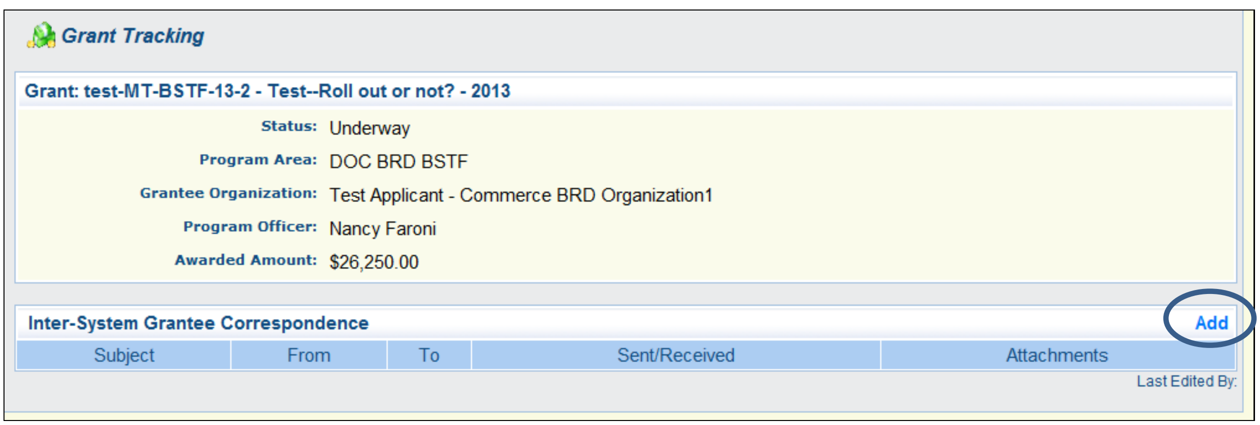
- To quickly tell if something has been uploaded into the system, you can look at the Grant Components screen as the system will tell you the last time the file was edited. The only exceptions are Claims, Status Reports and Correspondence.



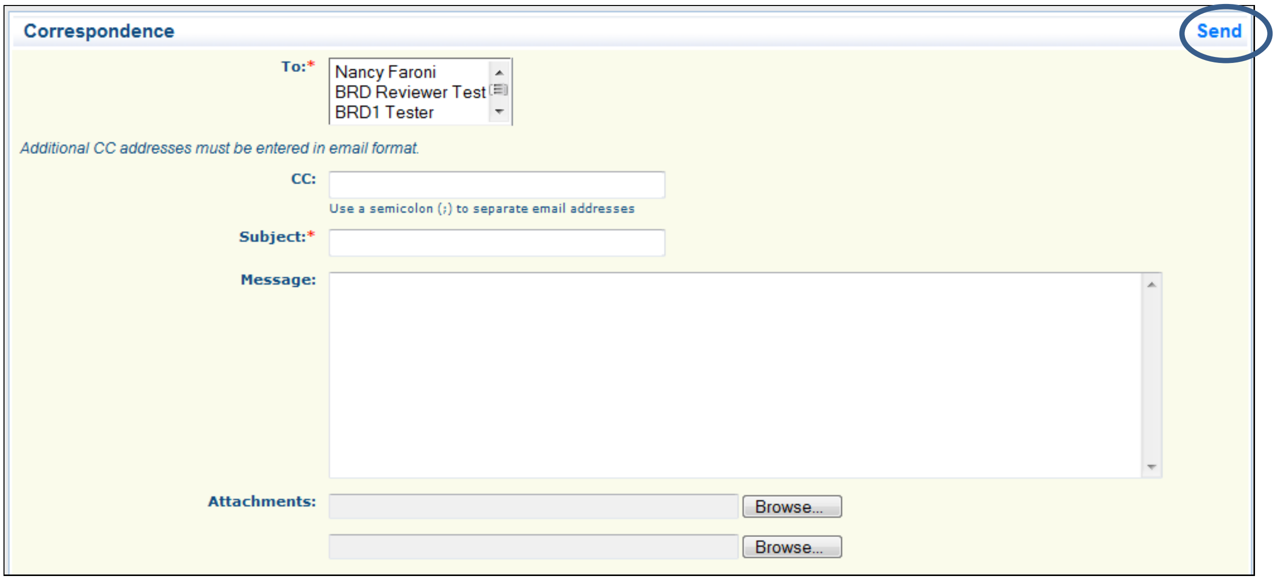
Correspondence

- To communicate through the on-line system, once the grant status has been changed to “Underway” use the “Correspondence” through the Grant Components.
- At the Grant Components screen, click “Correspondence”.

- The next screen will look like this:



- Click “Add”.
- The next screen will look like this:



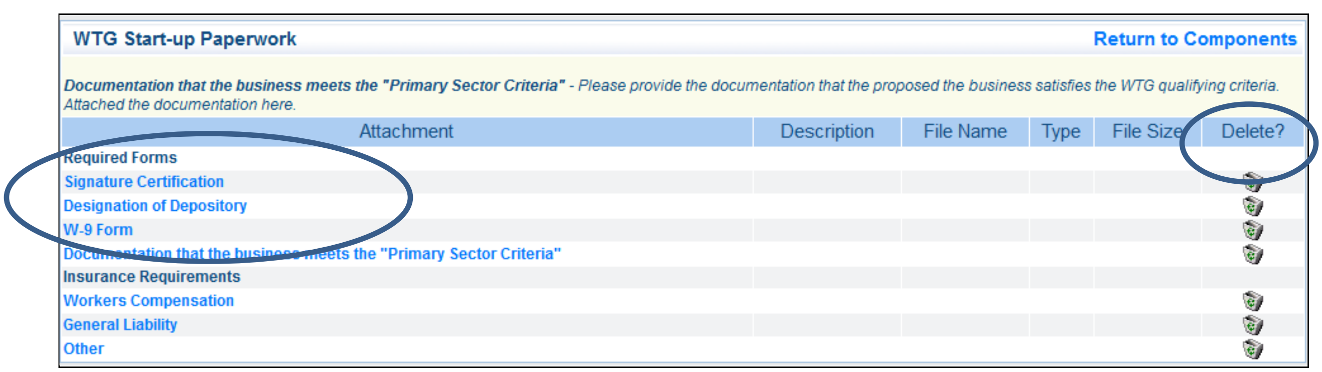
- The “To:” button will show all the individual associated with the grant. You can select multiply individuals.
- For attachments, click on “Browse”.
- Find the file on your computer and double click on it.
- The “Subject” is a required field.
- Once you entered your message, click “Send”.
- The message will remain with this grant and can be reviewed at any time by clicking on the “Subject”, which will be in blue font.

Attaching a File

There are two different ways to attach a file. One way is when there is an attachment list provided and second when there is no attachment list.

With Attachment List:

- The screen should look like this:

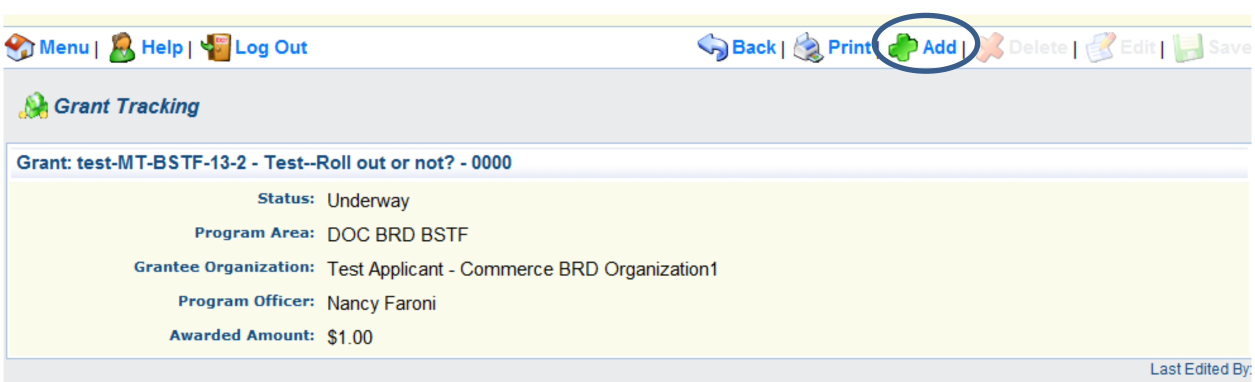


- Click on the correct Attachment Name, which will be shown in Light Blue Font.
- The next screen should look like this:

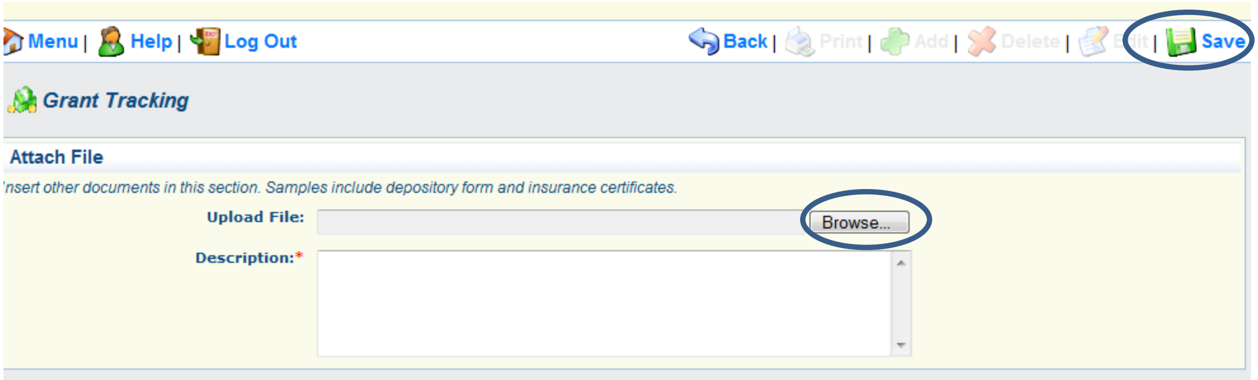
- Click "Browse" and locate the file on your computer.
- Double click on the file.
- The file name should then be listed as "Upload File".
- Add a description of the file, i.e. Workers Compensation Policy – expires 1-1-13.
- Click "Save" on the main menu.
- If you want to review the document, click on the "File Name" (will be in light blue font).
- If you need to delete the document, click on the recycle box under "Delete".

Without Attachment List:

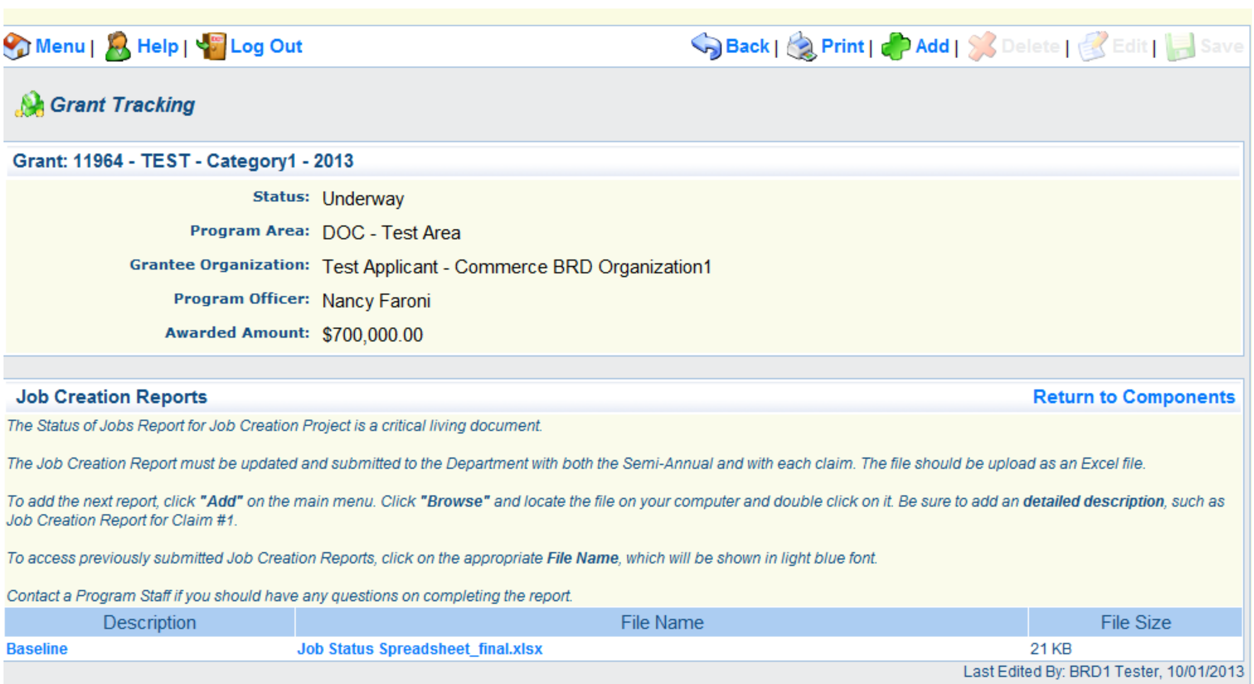
The screen will look like this:



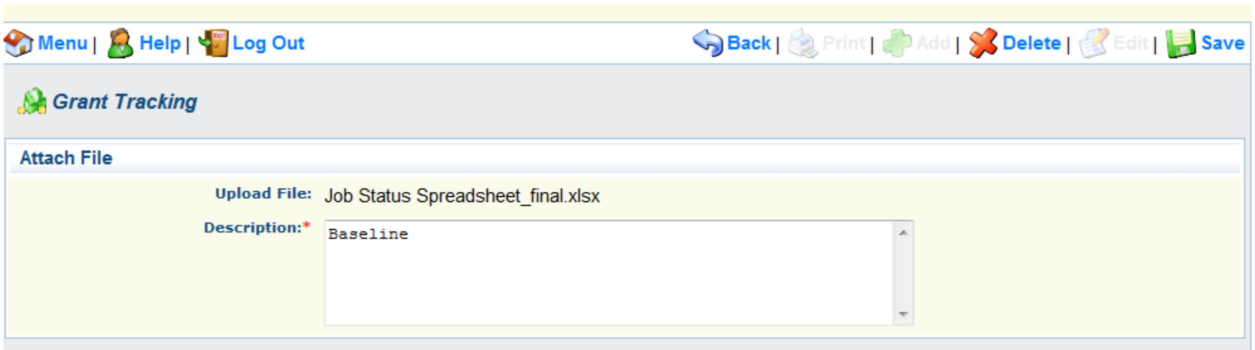
- Click on the "Add" button on the main menu.
- The next screen should look like:



- To add the file, click on “Browse”.
- Once you find the file on your computer, double click on it.
- Add a description (i.e. Designation of Depository).
- When finished entering the information, click “Save” on the main menu.
- The next screen will look like this:



- If you want to review the document, click on the “File Name” (will be in light blue font).
- To delete the file, click on the Description.
- The next screen will look like this:

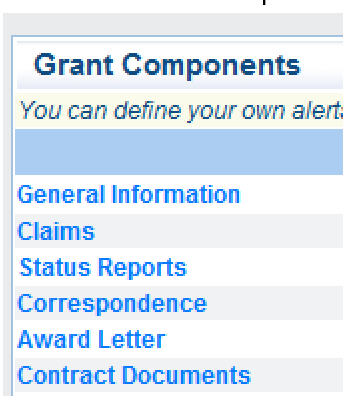


- Click "Delete" on the main menu.
- Once you have uploaded all the documents, click on "Return to Components".

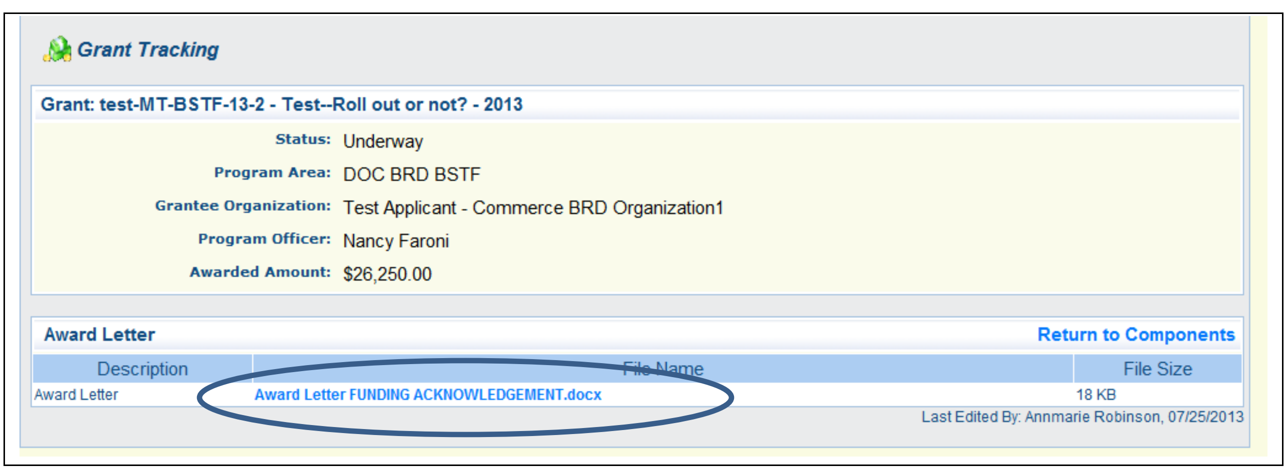
View Only Components

We have created grant components for ease in accessing information. Some of the components include the Award Letter, Contract Documents and Release of Funds. To access the information:

- From the "Grant Component" screen, click on the appropriate component.



- The next screen should look like this:

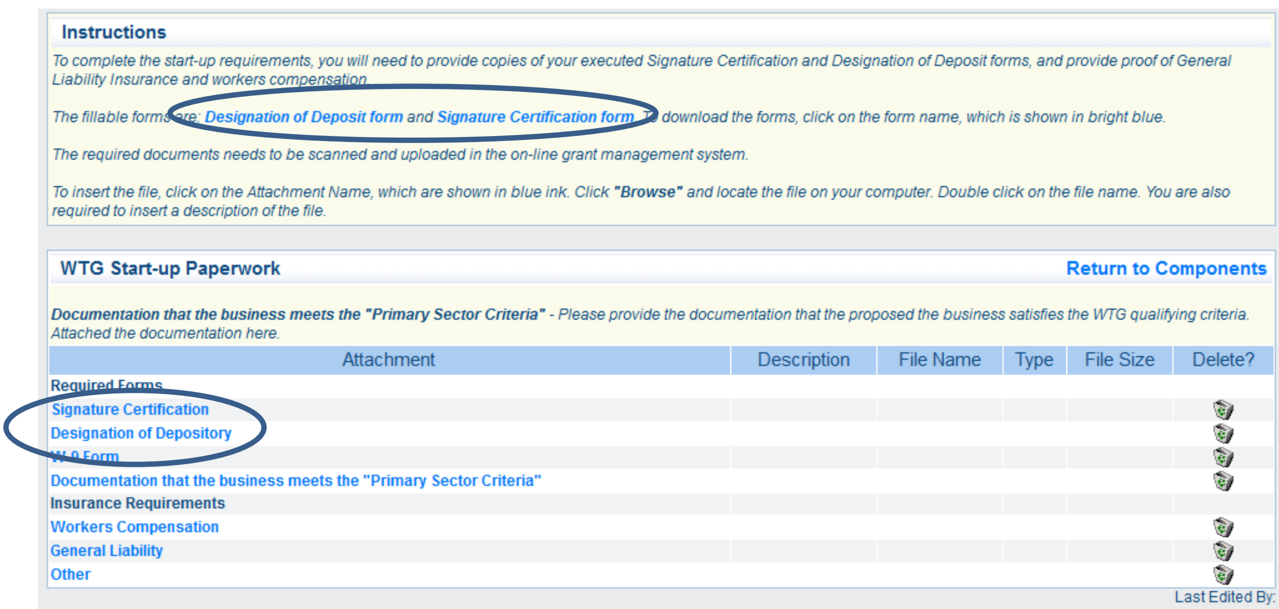


- Click on the File Name, which is shown in light blue font, to view the document.

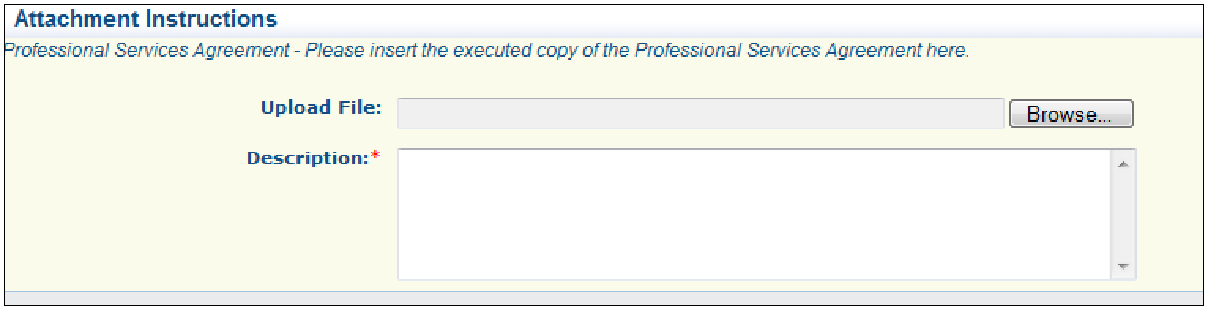
- This is a viewable component only.

Start-up Paperwork

- Applicants will need to execute and upload the following documents:
  - Signature Certification;
  - Designation of Depository;
  - Documentation that the business meets the “Primary Sector Criteria”, if applicable;
  - Worker’s Compensation;
  - General Liability Insurance as outlined in the contract;
- To upload the above documents, click on “Start-up Paperwork” on the Grant Components screen.
- The next screen will look like this:



- To download copies of the “Designation of Deposit” or “Signature Certification” forms, click on the name in the Instruction section.
- To upload the executed document, click on the appropriate Attachment name that you want to upload. (as a reminder: titles in light blue font is “clickable”).
- The next screen will look like this:

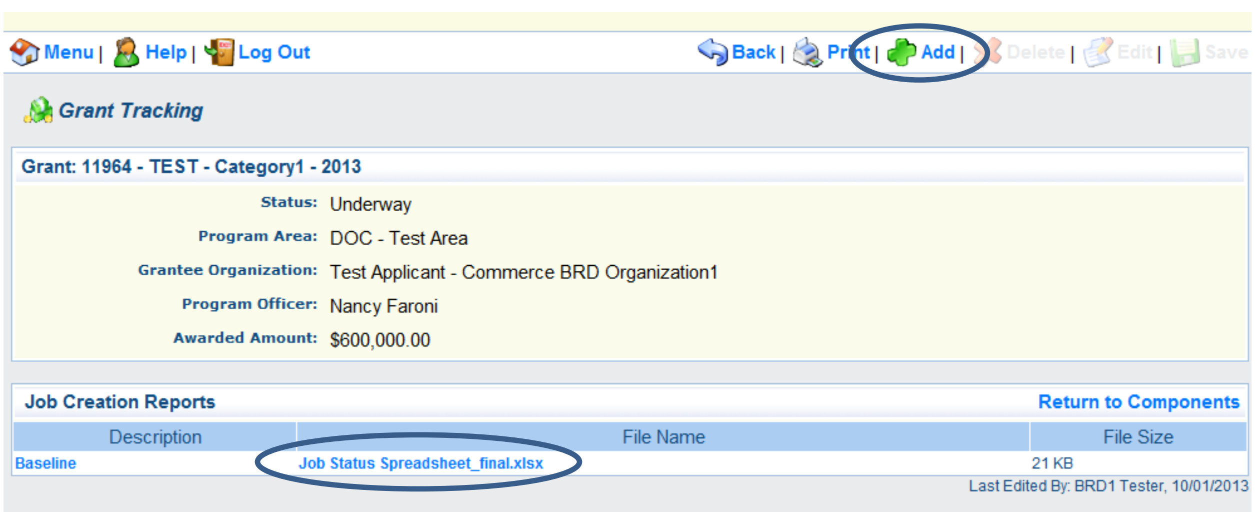


- See section on “Attaching a File”.
- Once you have uploaded all the Start-up Paperwork, <u>notify Program Staff through the “Correspondence” grant component. The WTG staff will review the information and if all the start-up paperwork has been completed, then the staff will issue the Release of Funds notice.</u>

Job Creation Report

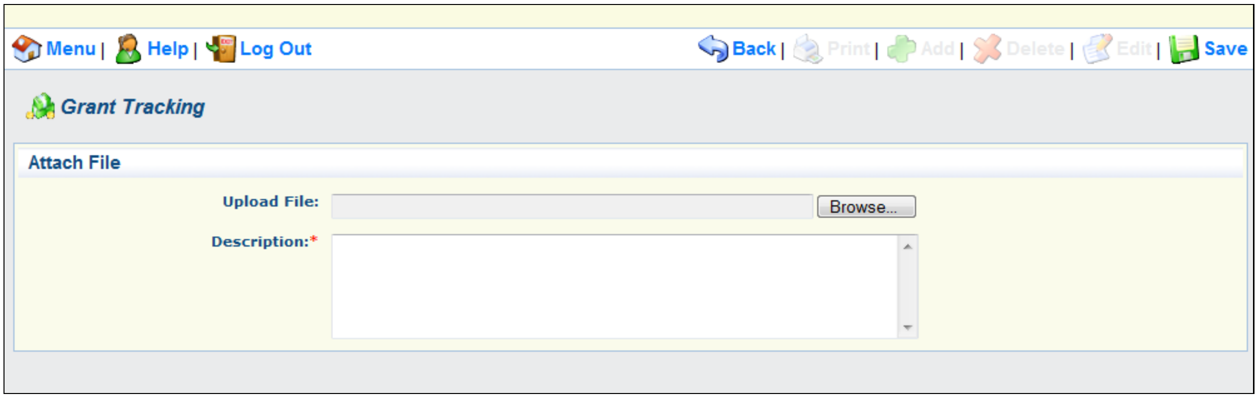
The Status of Jobs Report for Job Creation Project is a critical living document and as such we have created a separate grant component for this report.

- Utilizing the baseline report as the starting point, the Job Creation Report must be updated and submitted to the Department with each draw request.
- Each report will need to be uploaded, as an excel file, into the Job Creation Report Grant Components.
- To access previously submitted Job Creation Report or to upload a new report, click on the “Job Creation Report” from the “Grant Component” screen.
- The next screen will look like this:



- You can access the previously submitted spreadsheet through the on-line grant management system by clicking on the appropriate “File Name”, which will be shown in light blue font .
- To add the next report, click the **“Add”** on the main menu.

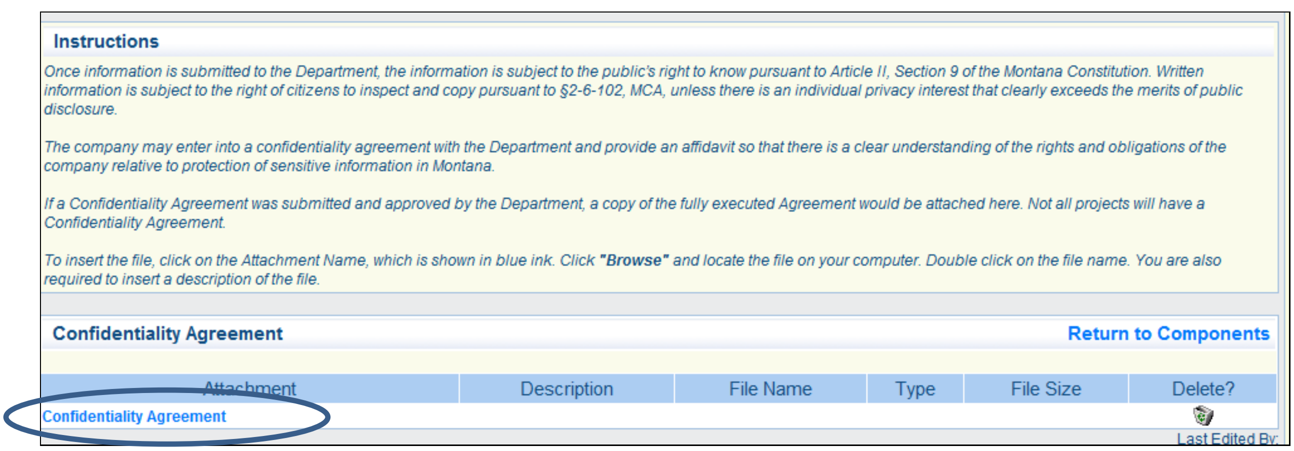
- The next screen will look like this:



- See section on “Attaching a File”.
- **<u>We are asking that you provide a detailed description, such as “Job Creation Report for Claim #1”.</u>**
- If you should have questions regarding how to complete the Job Creation Report, please contact the WTG staff for instructions.

Confidentiality Agreement

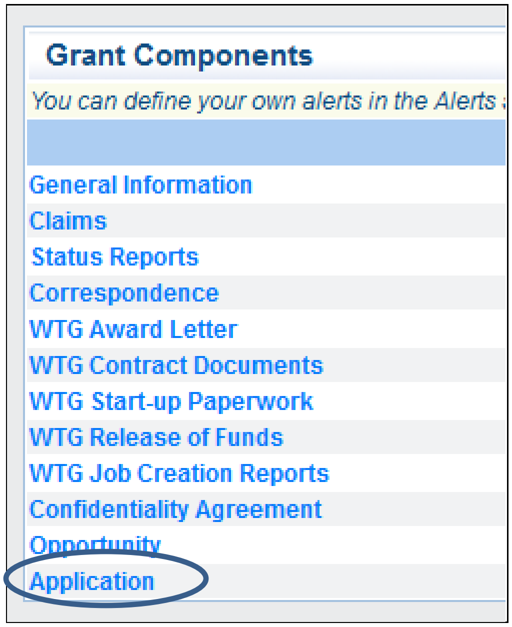
- If the application included a Confidentiality and Non-Disclosure Agreement, a copy of the fully executed Agreement will be uploaded into the system and can be viewed at any time during the project.
- To view the executed Confidentiality Agreement, select “Confidentiality Agreement” from the Grant Components screen.
- The next screen will look like this:



- Click on the file name, which will be shown in light blue font, to open the document.
- This is a viewable component only.

Application

- The submitted application is viewable at any time during the grant management process.
- To view the application, select "Application" from the "Grant Components" screen.

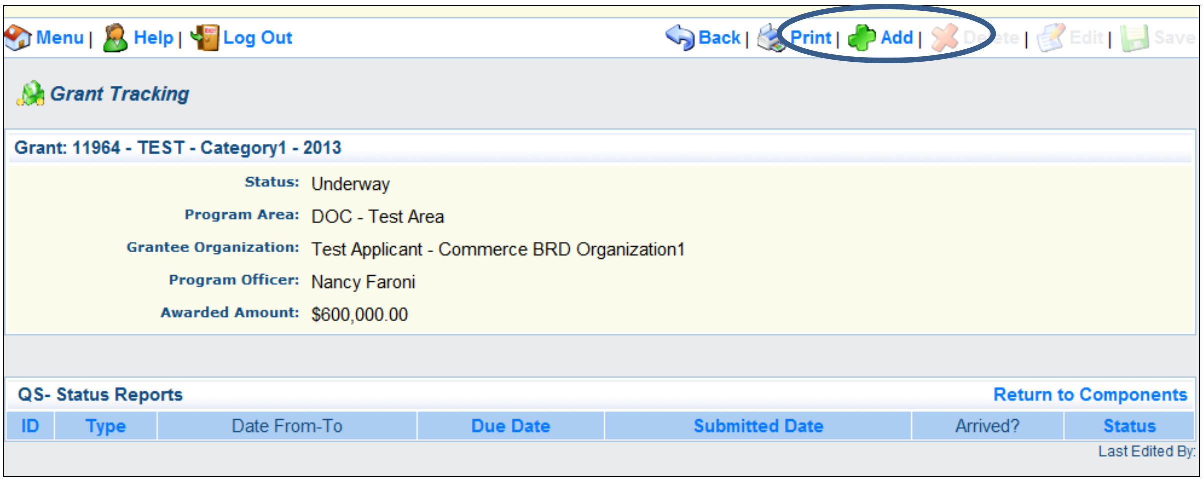


- It will open in a pdf copy of the application in a new window.
- To exit, close out of the window.

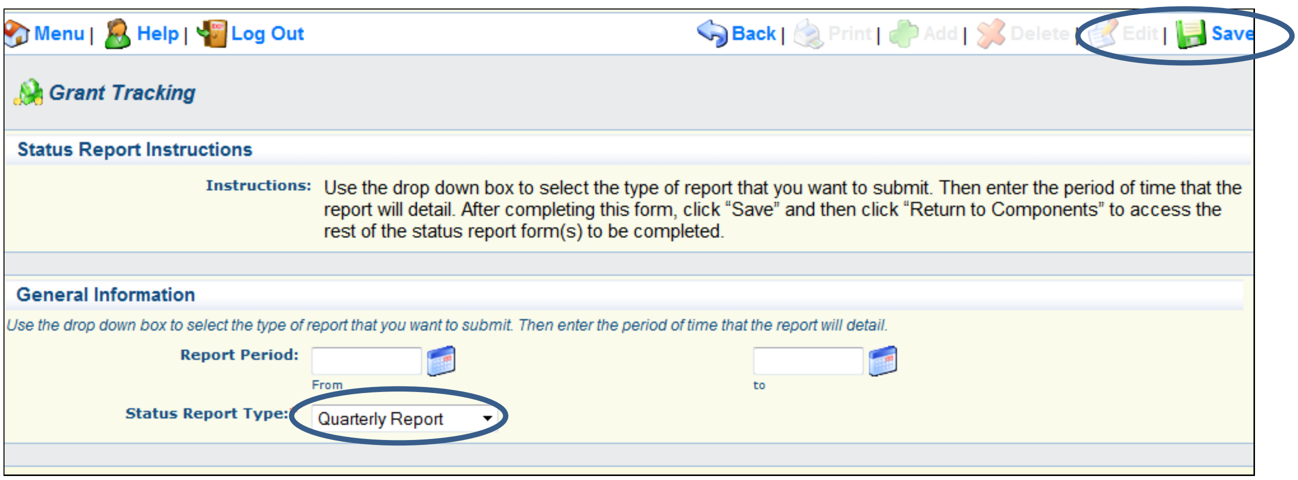
Status Reports

- From the Grant Components screen, select Status Report.
- The Status Report is used for the Semi-Annual Report and Final Report.

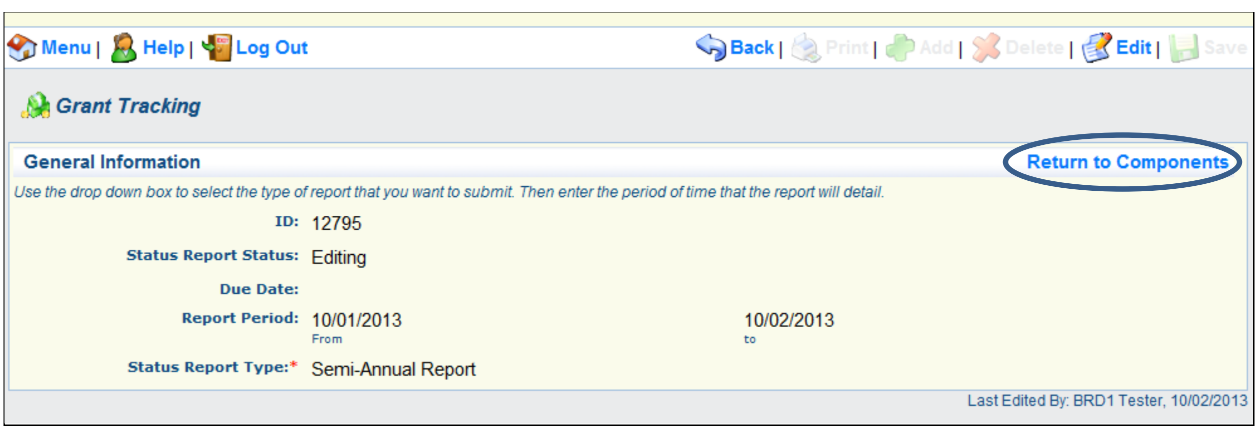
- The next screen will look like this:



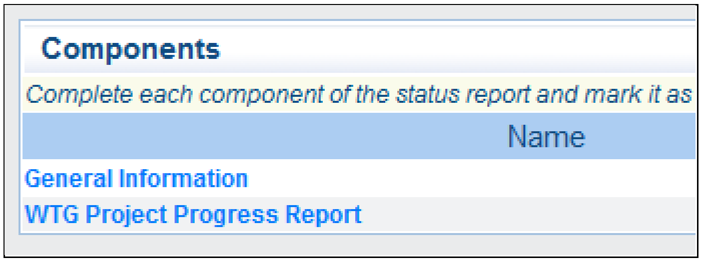
- Click "Add" on the main menu ribbon.
- The next screen will look like this:



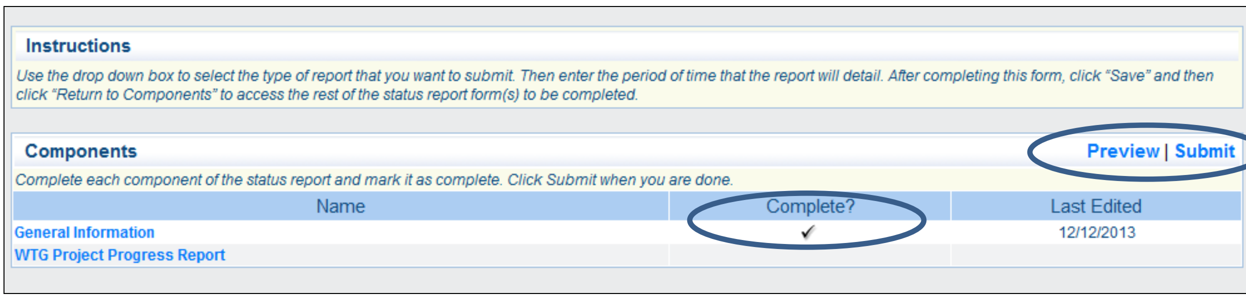
- Enter the report period and change the "Status Report Type" to Semi-Annual (default is Quarterly)
- Click "Save" on the main menu.
- The next screen will look like this:



- Once you verified the information, then click "Return to Components".
- The next screen will look like this:



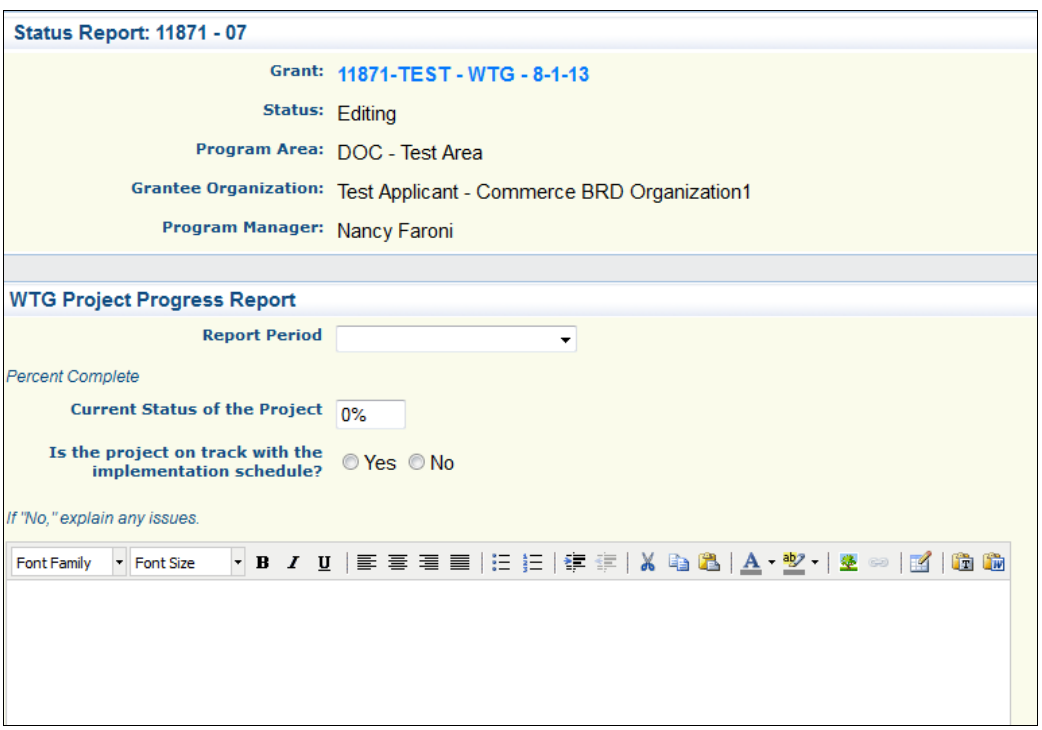
- You can complete the forms in any order. However, all the components must be completed before the system will allow you to submit the report.



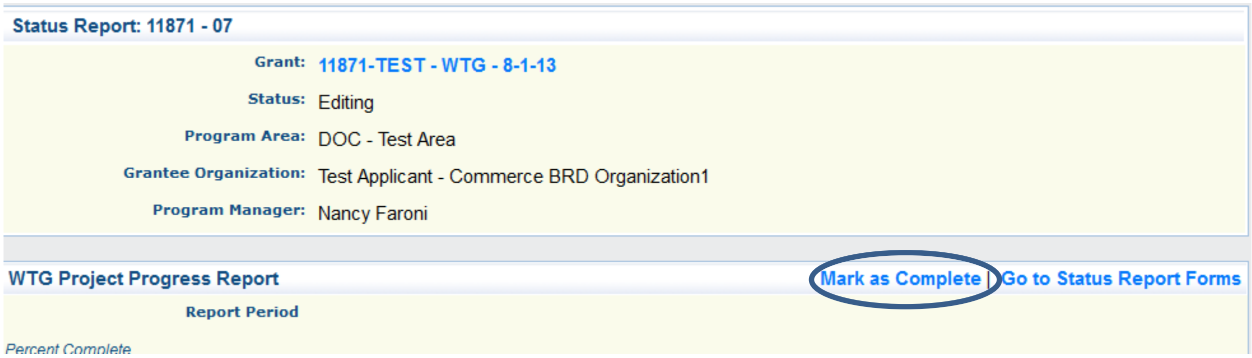
- Once all the items have been marked "Complete", then click "Submit".

Project Progress Report

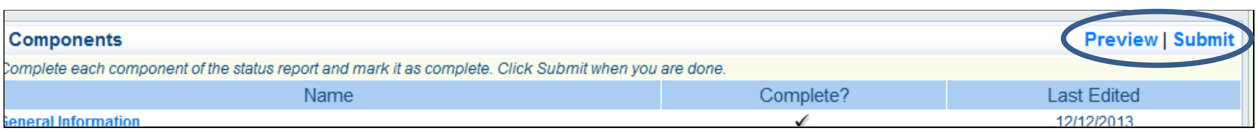
- By clicking on the "Project Progress Report", the next screen will look like this:



- Answer the questions. Questions with a red * are required, along with the Authorized Representative information.
- Once you completed the report, then click “Save” on the main menu ribbon.
- The next screen will look like this:



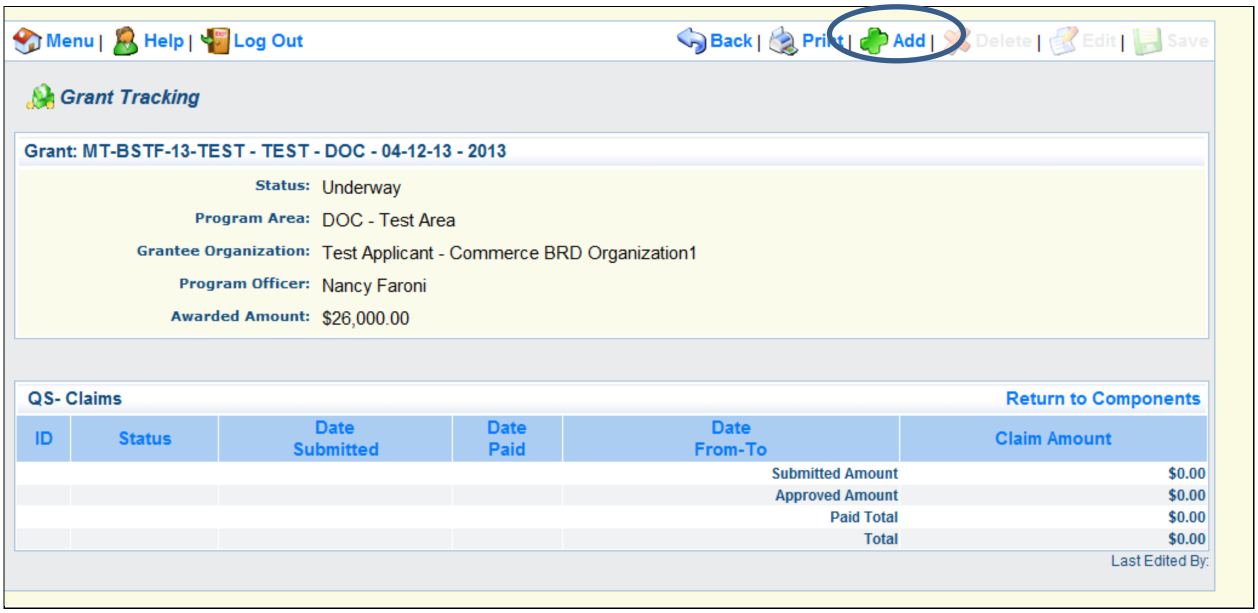
- Once you have verified the information, then Click “Mark as Complete”.
- Once you click “Mark as Complete”, you will return to the Components screen.
- Once all the components have been marked as complete, then you can submit the report by click on “submit”



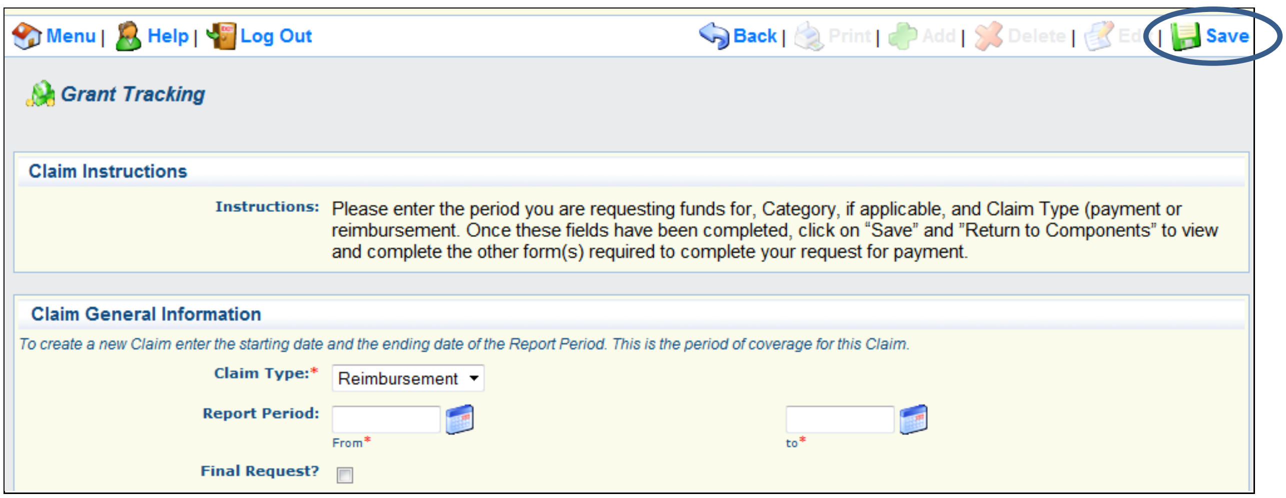
Claims

- From the Grants Components screen, click” Claims”.

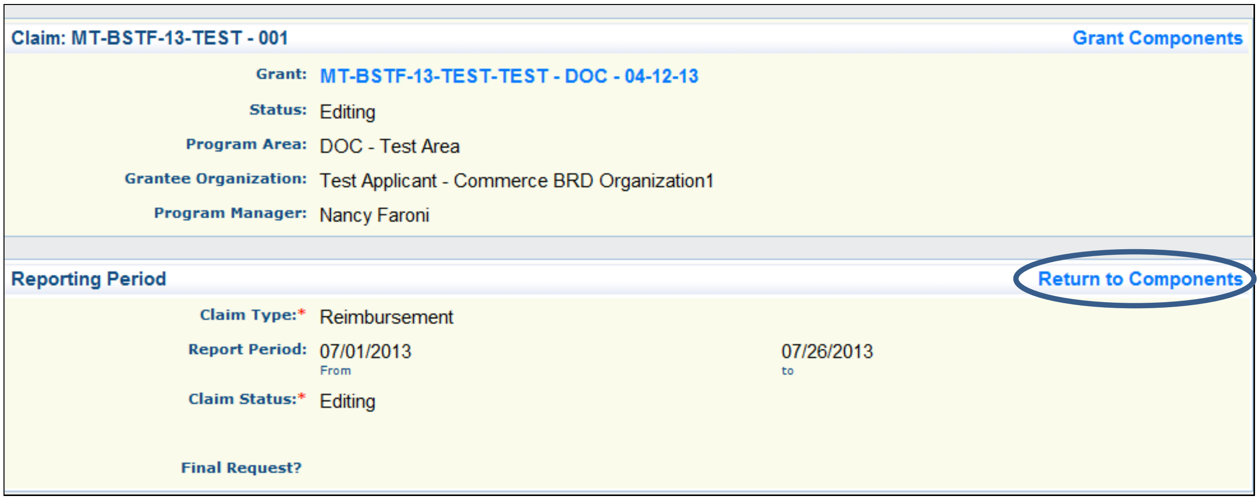
- The next screen should look like this:



- Click “Add” from the main menu ribbon.
- The next screen should look like this:



- The Claim Type is Reimbursement for all Business Resource Division programs.
- Insert the Report Period. This should be the dates that the reimbursement is covering and/or from the last claim date.
- If this is the Final Request, then check the box; otherwise click “Save” on the main menu ribbon.
- The next screen will look like this:



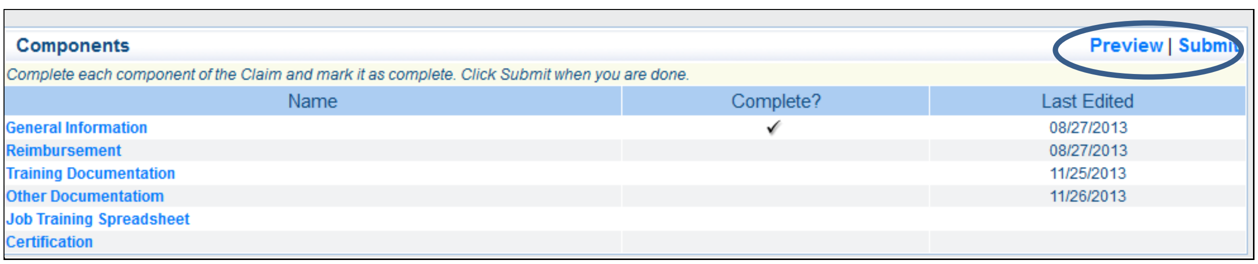
Claim: MT-BSTF-13-TEST - 001 | Grant Components

Grant: MT-BSTF-13-TEST-TEST - DOC - 04-12-13
Status: Editing
Program Area: DOC - Test Area
Grantee Organization: Test Applicant - Commerce BRD Organization1
Program Manager: Nancy Faroni

Reporting Period | Return to Components

Claim Type:* Reimbursement
Report Period: 07/01/2013 From 07/26/2013 to
Claim Status:* Editing
Final Request?

- Review the information and if correct, click "Return to Components".
- The next screen will list all the components that must be completed before the claim can be submitted.



Components | Preview | Submit

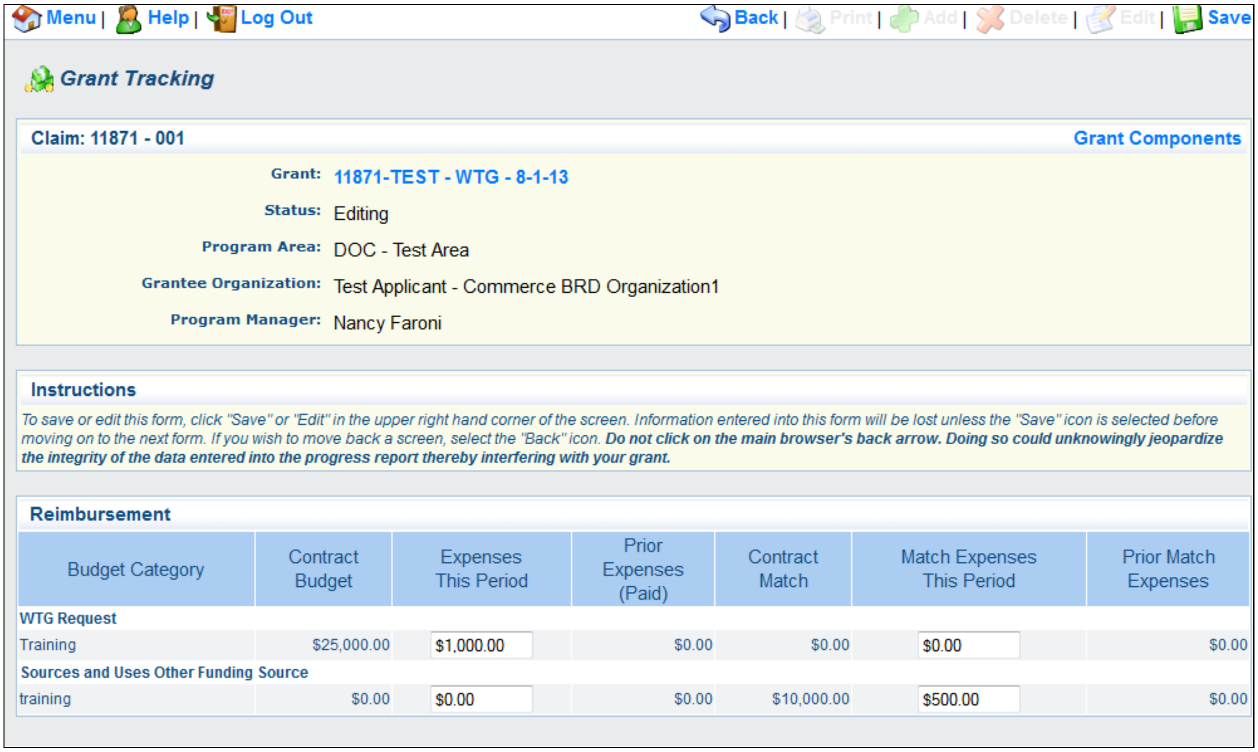
Complete each component of the Claim and mark it as complete. Click Submit when you are done.

Name	Complete?	Last Edited
General Information	✓	08/27/2013
Reimbursement		08/27/2013
Training Documentation		11/25/2013
Other Documentatiom		11/26/2013
Job Training Spreadsheet		
Certification		

- The Components can be completed in any order. However, all the components must be completed before the system will allow you to submit the report.
- Once all the items have been marked "Complete", then click "Submit".

Reimbursement

- By clicking on Reimbursement, the grantee can enter the expenses for this period (that you are requesting reimbursement for) and match expenses for this period.
- The reimbursement format will match the budget that was submitted in the application and approved by the Department.
- Enter the expenses for this period for both the WTG request and Match.
- The WTG request must match the WTG Job Training Spreadsheet.



Menu | Help | Log Out   Back | Print | Add | Delete | Edit | Save

Grant Tracking

Claim: 11871 - 001   Grant Components

Grant: 11871-TEST - WTG - 8-1-13
Status: Editing
Program Area: DOC - Test Area
Grantee Organization: Test Applicant - Commerce BRD Organization1
Program Manager: Nancy Faroni

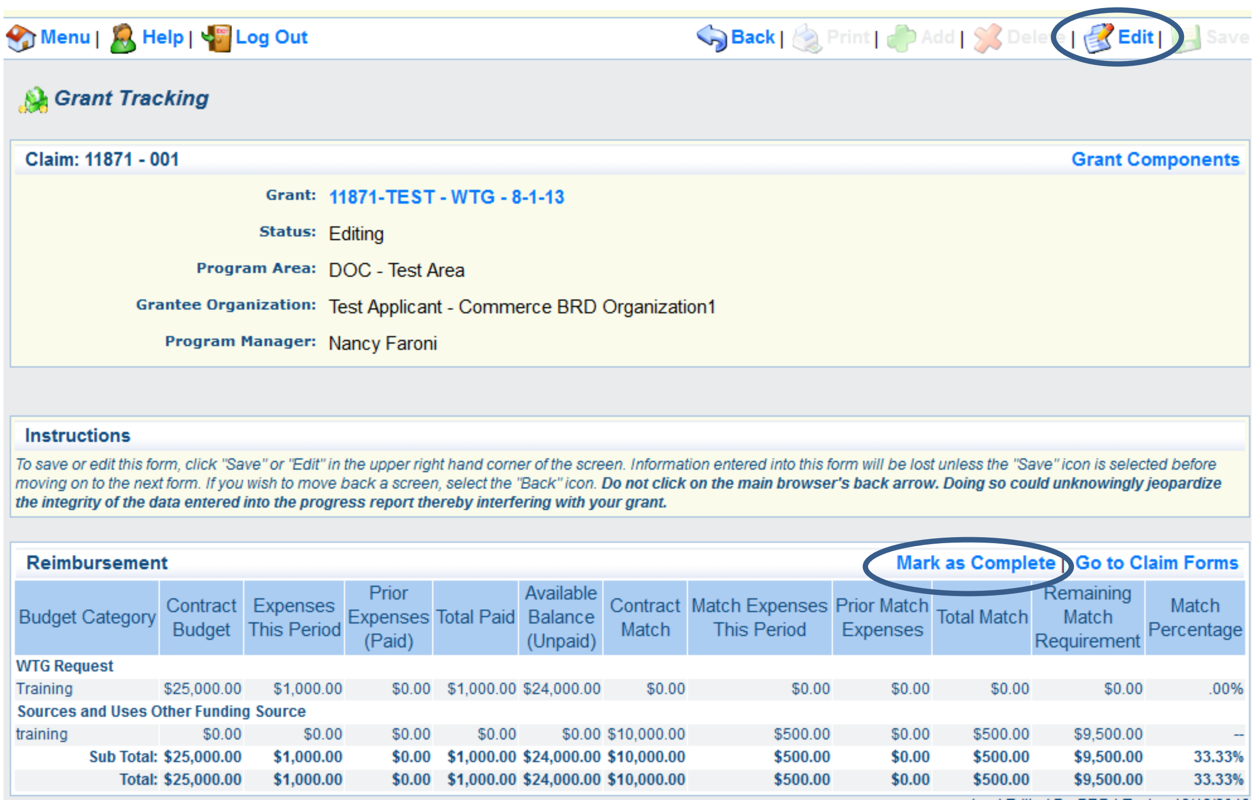
Instructions

To save or edit this form, click "Save" or "Edit" in the upper right hand corner of the screen. Information entered into this form will be lost unless the "Save" icon is selected before moving on to the next form. If you wish to move back a screen, select the "Back" icon. ***Do not click on the main browser's back arrow. Doing so could unknowingly jeopardize the integrity of the data entered into the progress report thereby interfering with your grant.***

Reimbursement

Budget Category	Contract Budget	Expenses This Period	Prior Expenses (Paid)	Contract Match	Match Expenses This Period	Prior Match Expenses
WTG Request						
Training	$25,000.00	$1,000.00	$0.00	$0.00	$0.00	$0.00
Sources and Uses Other Funding Source						
training	$0.00	$0.00	$0.00	$10,000.00	$500.00	$0.00

- When you are done entering the information, click "Save" on the main menu ribbon.
- Once you save, the next screen will show a summary and should look like this:



Menu | Help | Log Out   Back | Print | Add | Delete | Edit | Save

Grant Tracking

Claim: 11871 - 001   Grant Components

Grant: 11871-TEST - WTG - 8-1-13
Status: Editing
Program Area: DOC - Test Area
Grantee Organization: Test Applicant - Commerce BRD Organization1
Program Manager: Nancy Faroni

Instructions

To save or edit this form, click "Save" or "Edit" in the upper right hand corner of the screen. Information entered into this form will be lost unless the "Save" icon is selected before moving on to the next form. If you wish to move back a screen, select the "Back" icon. ***Do not click on the main browser's back arrow. Doing so could unknowingly jeopardize the integrity of the data entered into the progress report thereby interfering with your grant.***

Reimbursement   Mark as Complete | Go to Claim Forms

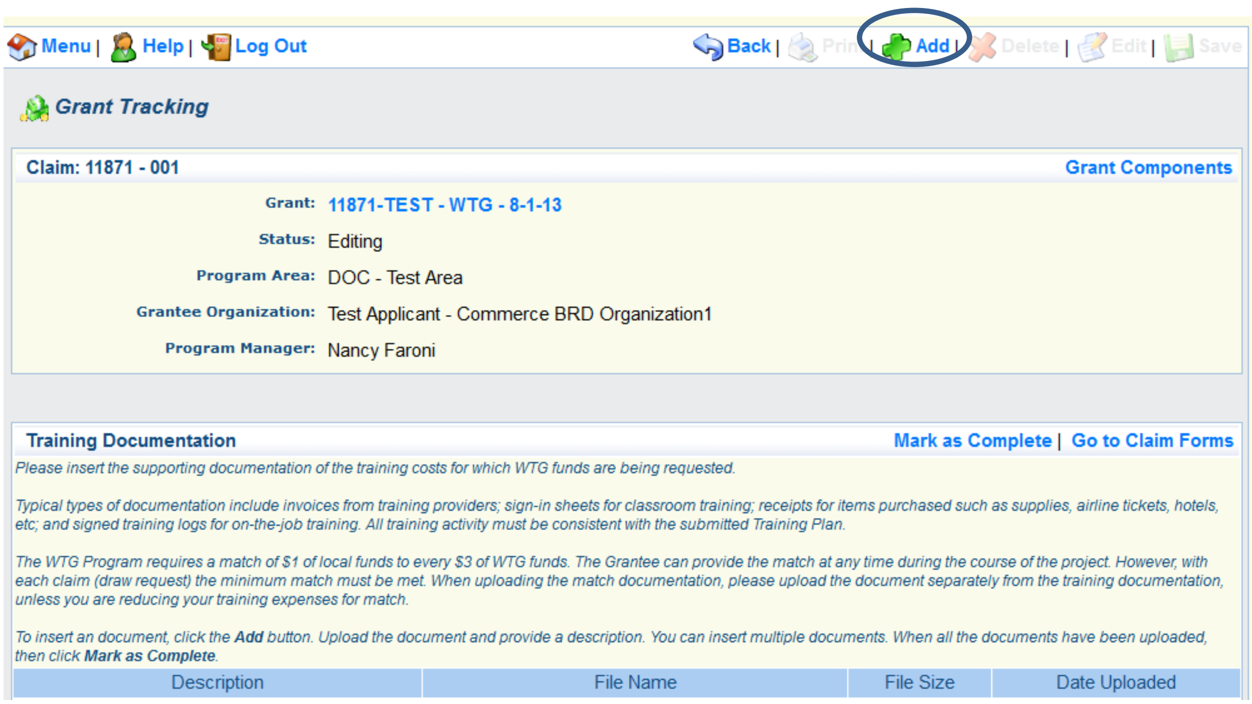
Budget Category	Contract Budget	Expenses This Period	Prior Expenses (Paid)	Total Paid	Available Balance (Unpaid)	Contract Match	Match Expenses This Period	Prior Match Expenses	Total Match	Remaining Match Requirement	Match Percentage
WTG Request											
Training	$25,000.00	$1,000.00	$0.00	$1,000.00	$24,000.00	$0.00	$0.00	$0.00	$0.00	$0.00	.00%
Sources and Uses Other Funding Source											
training	$0.00	$0.00	$0.00	$0.00	$0.00	$10,000.00	$500.00	$0.00	$500.00	$9,500.00	--
Sub Total:	**$25,000.00**	**$1,000.00**	**$0.00**	**$1,000.00**	**$24,000.00**	**$10,000.00**	**$500.00**	**$0.00**	**$500.00**	**$9,500.00**	**33.33%**
Total:	**$25,000.00**	**$1,000.00**	**$0.00**	**$1,000.00**	**$24,000.00**	**$10,000.00**	**$500.00**	**$0.00**	**$500.00**	**$9,500.00**	**33.33%**

- To correct an entry, click "Edit" on the main menu ribbon.

- Edit will re-open the reimbursement screen for corrections. Once correct, click “Save”.
- Once you have verified the information, then Click “Mark as Complete”.
- Once you click “Mark as Complete”, you will return to the “Components” screen.

Training Documentation

- The Business Resource Division typically pays on a reimbursement basis.
- Grantee will need to provide documentation of the training costs for which WTG funds are being requested. Typical types of documentation include invoices from training providers; sign-in sheets for classroom training; receipts for items purchased such as supplies, airline tickets, hotel receipts, etc. and signed training logs for on-the-job training. All training activities must be consistent with the submitted Training Plan.
- The WTG Program requires a match of $1 of local funds for every $3 of WTG funds. The grantee can provide the match at any time during the course of the project. However, with each claim (draw request), the minimum match must be met. When uploading the match documentation, please upload the document separately from the training documentation and clearly specified, unless you are reducing your training expenses for match.
- At the component screen, select “Training Documentation”.
- The next screen will look like this:



- To add a document, click “Add” on the main menu ribbon.
- See section on “Attaching a File”.
- Once you have finished uploading the documents, click “Mark as Complete”, which will return you to the Components screen.

Job Training Spreadsheet

- The WTG Job Training Spreadsheet is a living document.
- The spreadsheet template should be downloaded with the first claim. The spreadsheet should then reside on the Grantee's computer and updated with each claim (draw request). The updated spreadsheet should then be uploaded into the on-line system.
- Under the "Category Definitions" tab of the spreadsheet are directions on how to complete the spreadsheet.
- Copies of the training records and/or receipts associated that was included on the Job Training Spreadsheet must also be uploaded into the system under "Training Documents".

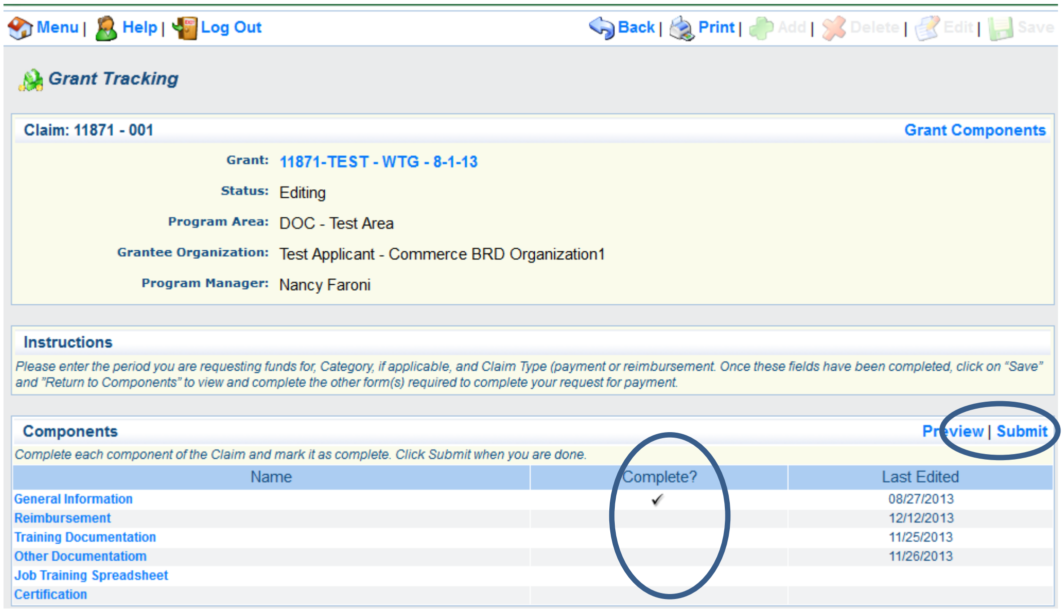
Other Documentation

- You can submit additional documentation on the training under the "Other Documentation" component. Typical types of documentation would include training certificates that may have been issued as a result of the WTG Training.
- **If the Grantee does not have any additional documentation beyond the information that was already updated in the "Training Documentation" section, the Grantee <u>must</u> still click "Mark as Complete" in this section.**

Certification

- As per the contract, "funds can be requested by sending a letter on an official letterhead signed by the contact listed in the contract, or by the individual who signed the contract, along with one additional signer designated as a certified signer".
- Hence, the Grantee must still update a signed letter requesting the funds that has been signed by the appropriate person.
- See "Attaching a File" for directions on how to upload the file.
- Once you have completed the component, click "Mark as Complete".
- **As a reminder, the corresponding Job Creation Report must also be uploaded into the Grant Component before the claim can be processed.**

Submitting Claim



Menu | Help | Log Out Back | Print | Add | Delete | Edit | Save

Grant Tracking

Claim: 11871 - 001 Grant Components

Grant:	11871-TEST - WTG - 8-1-13
Status:	Editing
Program Area:	DOC - Test Area
Grantee Organization:	Test Applicant - Commerce BRD Organization1
Program Manager:	Nancy Faroni

Instructions

Please enter the period you are requesting funds for, Category, if applicable, and Claim Type (payment or reimbursement. Once these fields have been completed, click on "Save" and "Return to Components" to view and complete the other form(s) required to complete your request for payment.

Components Preview | Submit

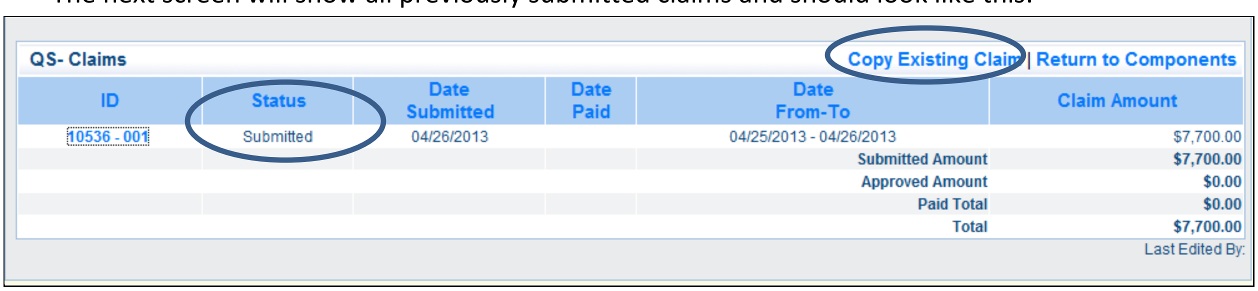
Complete each component of the Claim and mark it as complete. Click Submit when you are done.

Name	Complete?	Last Edited
General Information	✓	08/27/2013
Reimbursement		12/12/2013
Training Documentation		11/25/2013
Other Documentatiom		11/26/2013
Job Training Spreadsheet		
Certification		

- All the components must be shown as "Complete" before the system will allow you to submit the claim.
- Once all the required information has been marked as complete, then click "Submit".

Subsequent Claims

- A nice feature about the claim process is the ability to copy existing claim information for subsequent claims.
- At the Grant Components Screen, select "Claims".
- The next screen will show all previously submitted claims and should look like this:

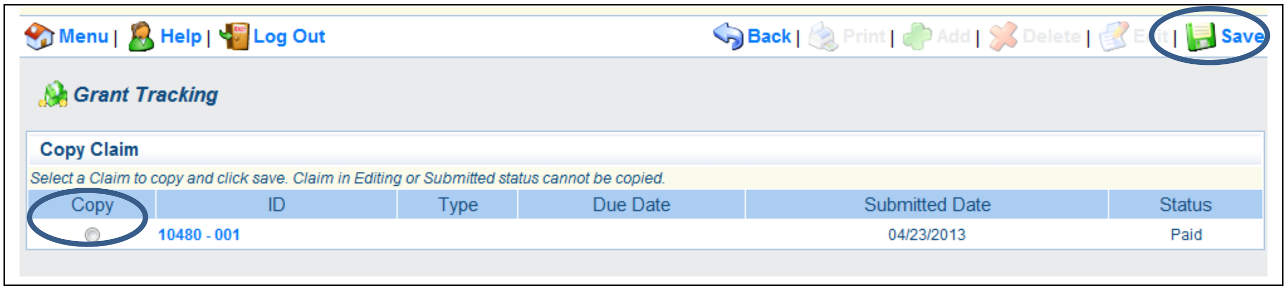


QS- Claims Copy Existing Claim | Return to Components

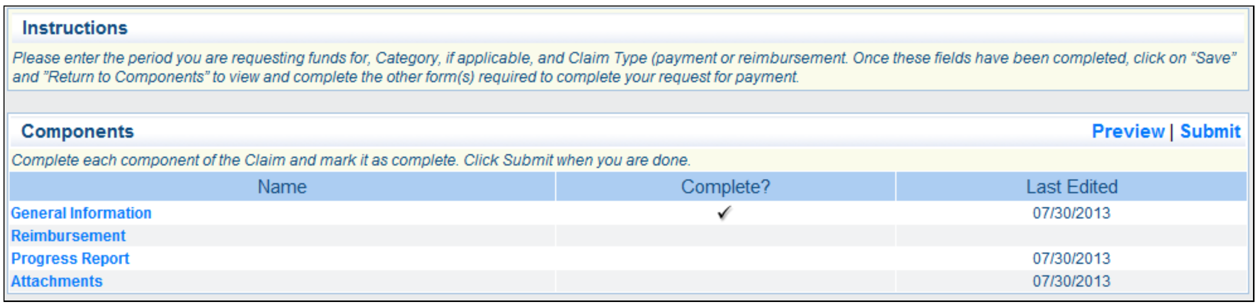
ID	Status	Date Submitted	Date Paid	Date From-To	Claim Amount
10536 - 001	Submitted	04/26/2013		04/25/2013 - 04/26/2013	$7,700.00
				Submitted Amount	$7,700.00
				Approved Amount	$0.00
				Paid Total	$0.00
				Total	$7,700.00

Last Edited By:

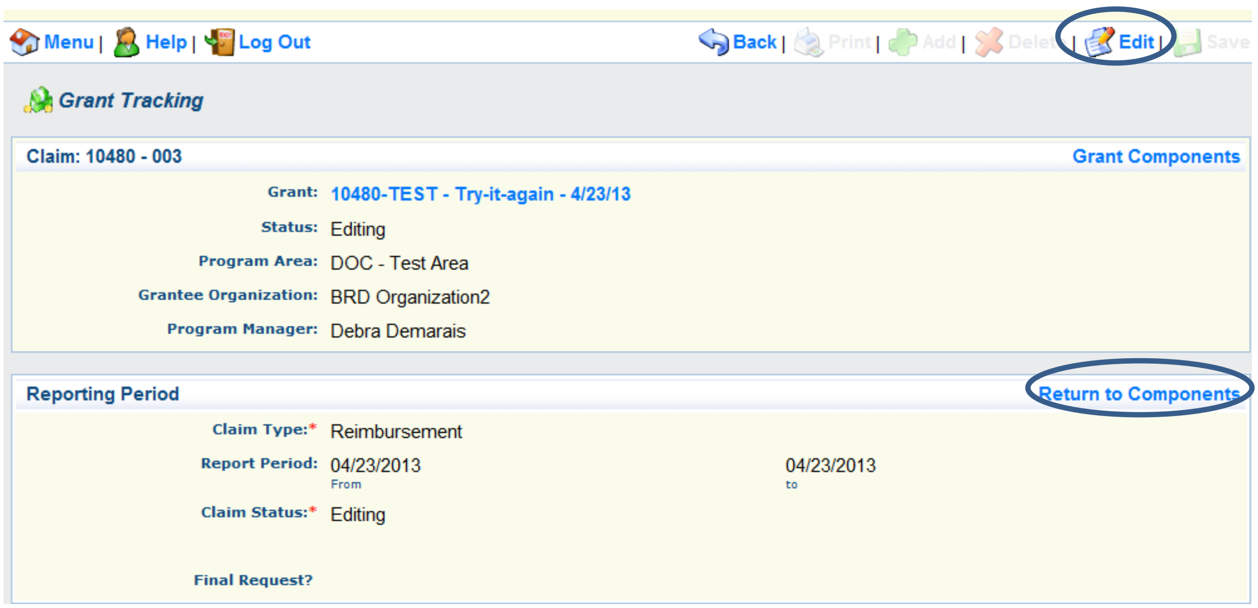
- From this screen, you can view the previously submitted claim by click on the ID (which will be in light blue font).
- You can copy an existing claim by clicking on "Copy Existing Claim". If the Claim status is shown as "Editing" or "Submitted", the claim cannot be copies forward.
- The next screen will look like:



- To copy this claim, click the copy button and click "Save" .
- This will re-direct you to the following screen:



- Even though this shows that the General Information is "Complete", you will still need to click on "General Information" and correct the Report Period.

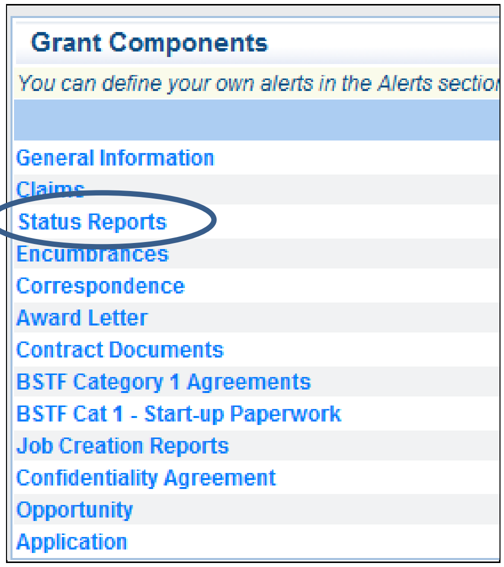


- To edit the "Report Period", click "Edit" on the main menu.
- Once you corrected the Reporting Period, then click "Save" on the main menu.
- To finish the claim, you will need to click "Return to Components".
- All the Components must be completed before the claim can be submitted.

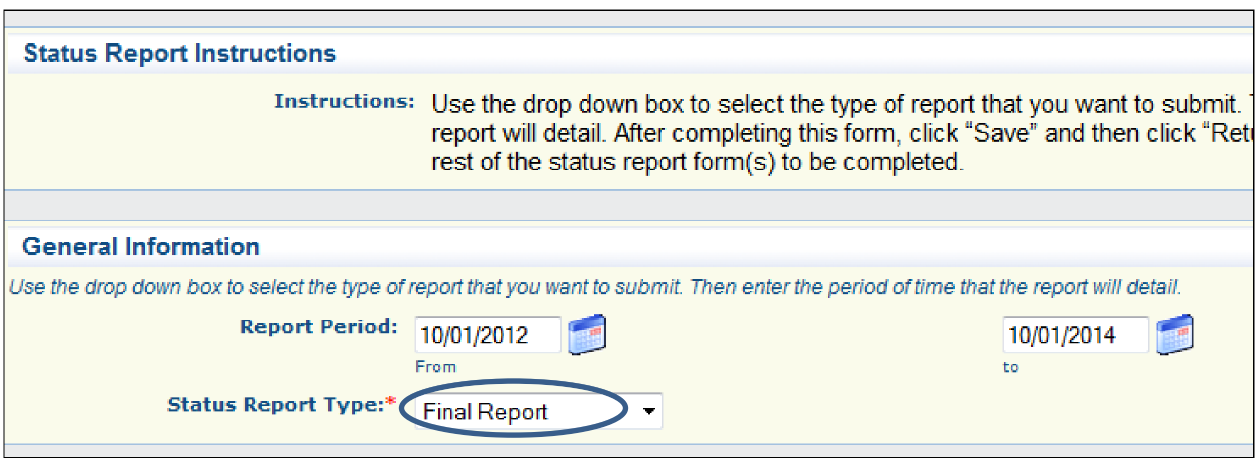
Completion Report

Once all the WTG funds have been drawn, received and expended, the applicant will need to submit a Final Report.

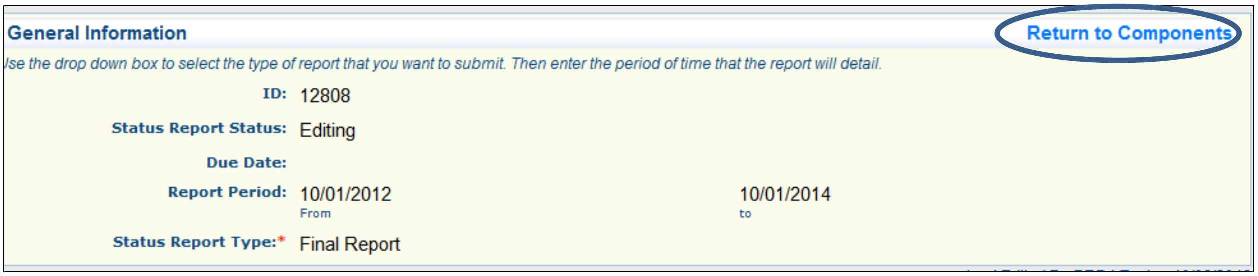
- From the grant component screen, select "Status Report".



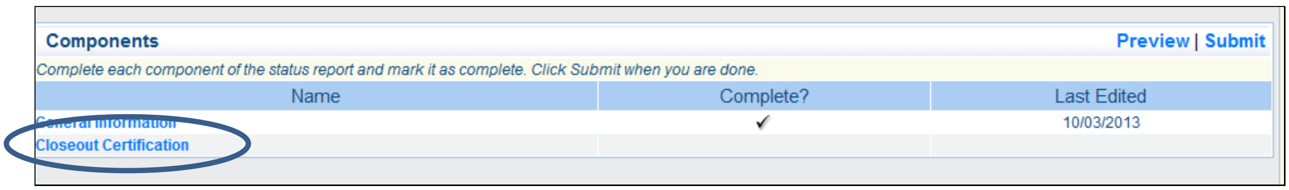
- The next screen will look like this:



- Be sure to change the "Status Report Type" to "Final Report".
- Click "Save" on the Main Menu.
- The next screen will look like this:

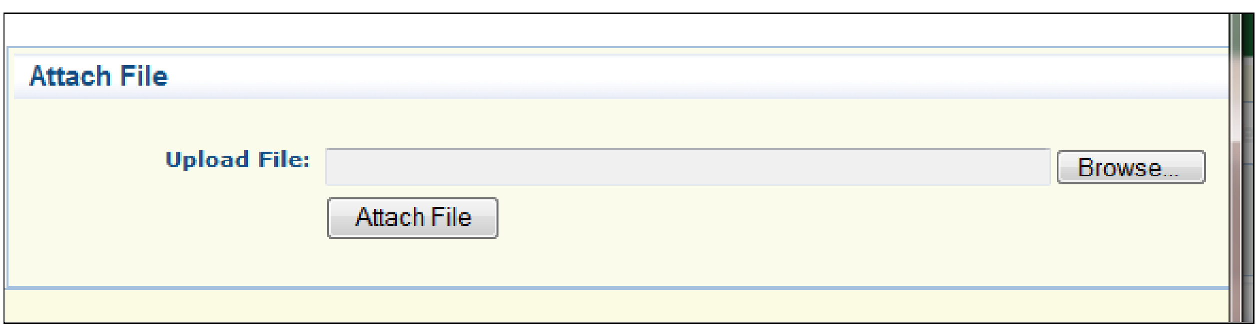


- After you verified the information, click "Return to Components".
- The only component is the completion of a Closeout Certification.
- From the Final Report Components, select "Closeout Certification".



- Download the Certification form by clicking "Closeout Certification", which will be shown in light blue ink, within the instruction section.

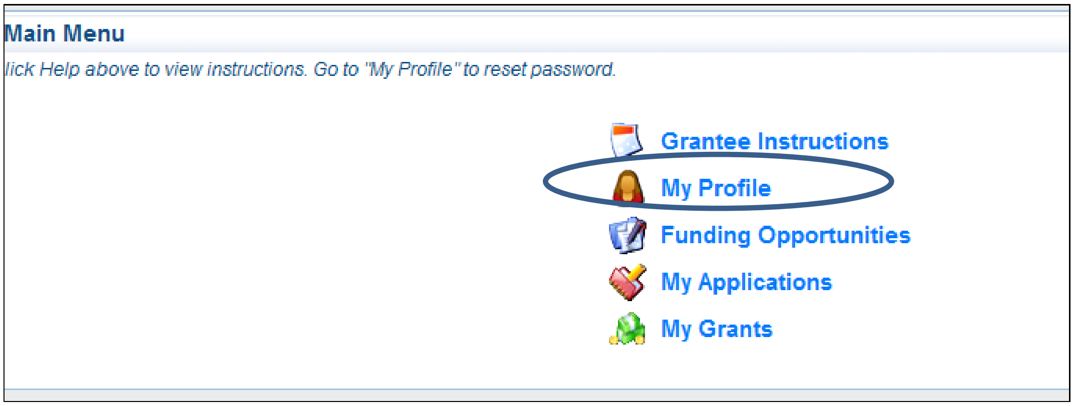
- The executed form can be uploaded by clicking on the add document button.



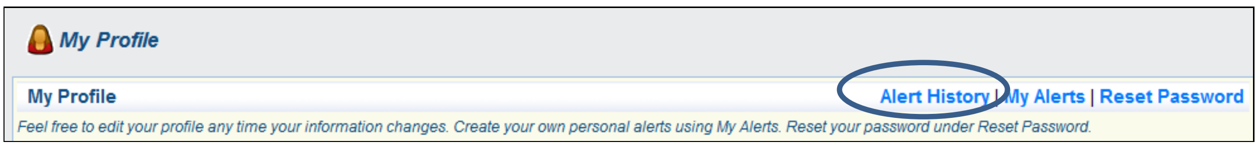
- Click "Browse" and locate the file on your computer. Double click on the file name, then click "Attach File".
- **Send correspondence through Webgrants that the form has been uploaded.**

Checking Previously Sent Alerts

To view the alerts that have been sent through the system, click "My Profile" from the main menu.



From the profile page, click "Alert History".



This will provide a list of all the alerts that have been sent to the email address listed on the Profile page.